



REQUEST FOR PROPOSAL DEMANDE DE PROPOSITION

Proposal To: Transport Canada

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods and services listed herein and on any attached sheets at the price(s) set out therefore.

Proposition à : Transports Canada

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens et services énumérés ici et sur toute feuille ci-annexée, au(x) prix indique(s).

Comments - Commentaires

THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT
CE DOCUMENT CONTIENT DES EXIGENCES RELATIVES À LA SÉCURITÉ

RETURN BIDS TO: RETOURNER LES SOUMISSIONS À :

epost Connect

Title - Sujet Supply Chain Analysis of Crude Oil and Petroleum Products in Canada.	
Solicitation No. / N° de l'invitation T8080-210721	Date of Solicitation / Date de l'invitation April 22, 2022
Address enquiries to: - Adresser toute demande de renseignements à : Natasha Blackstein Telephone No. - N° de telephone 343-550-2321 E-Mail Address - Courriel Natasha.blackstein@tc.gc.ca	
Destination See herein - Voir aux présentes	

Instructions: Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item.

Instructions : Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés « rendu droits acquittés », tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente harmonisée doit être indiqué séparément.

Delivery required OR requested / Livraison exigée OR demandée See herein - Voir aux présentes OR [Insert date] - [Insérer la date]	Delivery offered / Livraison proposée Not applicable - Sans objet
Vendor/Firm Name and Address / Raison sociale et adresse du fournisseur/de l'entrepreneur	
Person authorized to sign on behalf of Vendor/Firm (type or print): / La personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie) :	
Name - Nom	Title - Titre
Signature	Date

Solicitation Closes - L'invitation prend fin At - à : 2:00 PM - 14:00 On - le : June 1, 2022 Time Zone - Fuseau Horaire : Eastern Daylight Time
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PART 1 - GENERAL INFORMATION

1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, and any other annexes.

1.2 Summary

- 1.2.1 The Transportation of Dangerous Goods Directorate (TDG), based on risks, develops safety regulations and standards, conducts oversight, and provides expert advice on dangerous goods incidents to promote public safety in the transportation of dangerous goods by all modes of transport in Canada.

Canada is a major supplier of secure, reliable crude oil to international markets, producing 4.6 million barrels per day (mb/d) of crude oil in 2018 . Canada also holds one of the world's largest oil reserves in the world, surpassed only by Saudi Arabia and Venezuela². Canada has 168 billion barrels of proven oil reserves, of which 164 billion barrels are in the form of oil sands³. In 2018, 96% of Canadian crude oil exports went to the U.S. and 4% went to Europe, Asia and the Caribbean⁴. As a result, Canada was the largest foreign supplier of crude oil to the U.S., accounting for 48% of total U.S. crude oil imports and for 22% of U.S. refinery crude oil intake⁵.

As the world recovers from the COVID-19 pandemic, Canadian crude oil output and exports are predicted to grow. In its most recent forecast, the Canada Energy Regulator predicts that by 2040, oil sands production in Canada will increase by approximately 1.5 million barrels per day. As well, Canadian oil production is set to hit a record 5.87 million barrels per day on average in 2022, its highest level ever . In addition to crude oil being a concern for TDG due to high transported volumes and its involvement in many dangerous goods incidents, these forecasts are highlighting a need to re-examine the crude oil supply chain in Canada.

TDG completed its last supply chain analysis on crude oil and petroleum products in 2016. An update to this study will provide an overview of the current handling, offering for transport, transport and import of these dangerous goods in Canada, their respective modes of transport and routing, as well as identification of facilities involved in these supply chains. This update will

also provide an overview of how the crude oil and petroleum products supply chain has changed over the past 6 years.

The primary objective of this GIS study is to comprehensively describe the supply chain from a safety perspective for crude oil and petroleum products in Canada including comprehensive information on crude oil carried by trucks from oil head to rail head, for the purposes of contributing to informed policy decisions regarding safety regulations. In addition, the study will analyze how the supply chains have changed since the previous study in 2016.

- 1.2.2 There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website".
- 1.2.3 This requirement is subject to the COVID-19 Vaccination Policy for Supplier Personnel. Failure to complete and provide the COVID-19 Vaccination Requirement Certification as part of the bid will render the bid non-responsive.
- 1.2.4 This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled Bidder Instructions, and Part 3 entitled Bid Preparation Instructions, of the bid solicitation, for further information.

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The [2003](#) (2020-05-28) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days

Insert: 180 days

2.2 Submission of Bids

Bids must be submitted only to Transport Canada via epost Connect by the date, time and place indicated in the bid solicitation at natasha.blackstein@tc.gc.ca

Note: Bids will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions [2003](#), or to send bids through an epost Connect message if the bidder is using its own licensing agreement for epost Connect.

2.2.1 epost Connect

- a. Unless specified otherwise in the bid solicitation, bids may be submitted by using the [epost Connect service](#) provided by Canada Post Corporation.
 - i. The only acceptable email address to use with epost Connect for responses to bid solicitations issued by Transport Canada is: natasha.blackstein@tc.gc.ca , or, if applicable, the email address identified in the bid solicitation.
- b. To submit a bid using epost Connect service, the Bidder must either:
 - i. send directly its bid only to natasha.blackstein@tc.gc.ca , using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
 - ii. send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time, (in order to ensure a response), an email that includes the bid solicitation number to natasha.blackstein@tc.gc.ca requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
- c. If the Bidder sends an email requesting epost Connect service to the specified email in the bid solicitation, an officer of Transport Canada will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access and action the message within the conversation. The Bidder will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.

- d. If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.
- e. The bid solicitation number should be identified in the epost Connect message field of all electronic transfers.
- f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian mailing address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
- g. For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
 - i. receipt of a garbled, corrupted or incomplete bid;
 - ii. availability or condition of the epost Connect service;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the bid;
 - v. failure of the Bidder to properly identify the bid;
 - vi. illegibility of the bid;
 - vii. security of bid data; or,
 - viii. inability to create an electronic conversation through the epost Connect service.
- h. Transport Canada will send an acknowledgement of the receipt of bid document(s) via the epost Connect conversation, regardless of whether the conversation was initiated by the supplier using its own license or Transport Canada. This acknowledgement will confirm only the receipt of bid document(s) and will not confirm if the attachments may be opened nor if the content is readable.
- i. Bidders must ensure that they are using the correct email address for Transport Canada when initiating a conversation in epost Connect or communicating with Transport Canada and should not rely on the accuracy of copying and pasting the email address into the epost Connect system.
- j. A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;

- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, the [Members of Parliament Retiring Allowances Act](#), R.S. 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes** () **No** ()

If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes** () **No** ()

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;

- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.5 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

2.6 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
 - Office of the Procurement Ombudsman (OPO)
 - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that the Bidder submits its bid in accordance with section Part 2 – Bidder Instructions 2.3 epost Connect. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

The bid must be gathered per section and separated as follows:

Section I: Technical Bid (1 copy)

Section II: Financial Bid (1 copy)

Section III: Certifications (1 copy)

It is recommended that all electronic documents be submitted using PDF file format.

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

Section I: Technical Bid

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Section II: Financial Bid

3.1.1 Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B".

3.1.2 Exchange Rate Fluctuation

C3011T (2013-11-06), Exchange Rate Fluctuation

Section III: Certifications

Bidders must submit the certifications and additional information required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical, financial, evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

For any project summaries provided in demonstration of mandatory or rated experience requirements, the resource must provide:

- a) Name of the client(s) / employer(s);
- b) A brief description of the objective and scope of the service provided and the number of participant(s)
- c) The start and end dates (month and year) of the project / work;
- d) The dollar (\$) value of the project;
- e) The total number of years' experience performing each mandatory and technical criteria;
- f) Details about the work performed by the proposed resource including number of working months, tasks, technologies used, and deliverables;
- g) The extent to which the services were provided on-time, on-budget and in accordance with the established project; and,
- h) Client / employer reference that can attest to the proposed resource's experience (References are only contacted to validate the information provided in the bidder's proposal)

*The month(s) of experience listed for a project or experience whose timeframe overlaps that of another referenced project or experience will only be counted once.

For example: Project 1 timeframe is July 2015 to December 2015; Project 2 timeframe is October 2015 to January 2016; the total months of experience for these two project references is seven (7) months

The Bidder's Proposed Resource			
Criterion	Mandatory Criteria	Met / Not Met	Cross Reference in Proposal
MT-1	<p>The Bidder must submit a detailed Work Plan describing how it will meet the requirements of the Statement of Work (SOW) Annex A. The work plan should include:</p> <ul style="list-style-type: none"> • The Contractor's understanding of the scope of work and requirements needed to complete the study; • A draft Table of Contents for the report which will define how the report is organized; • A draft of methodologies to be used for data collection, data analysis and GIS analysis; • The Contractor demonstrates that they can produce all geospatial deliverables using ESRI ArcGIS suite of products including producing all maps in ESRI ArcGIS map documents (mxd) or ESRI ArcGIS Project Files (aprx). • Description of data and metadata formatting, naming conventions, and any other means to which the Contractor will organize the data; • A paragraph by paragraph statement of compliance with the Statement of Work (SOW); • The schedule of work and timeline for project deliverables (GANTT chart or similar) showing activities and milestones; • A draft reference list, including preliminary sources for data, internal data sources TDG must provide, as well as external datasets that TDG may assist in acquiring. 		
MT-2	<p>The Bidder must propose a Project Team consisting of at least a Project Manager, a GIS Specialist, and an Oil Industry Specialist.</p> <ul style="list-style-type: none"> • The bidder must provide details on the Project Team proposed to carry out the study, complete with language capabilities (in the official languages of Canada), resumes and project descriptions for each team member. <p>Note: The Bidder may use the same person to fill more than one position in the Project Team.</p>		
MT-3	<p>The Bidder must demonstrate using project descriptions (minimum 2) that the proposed resource as the Project Manager:</p> <ul style="list-style-type: none"> • Has a minimum of two (2) years cumulative experience (within the period from March 31, 2013 to April 1, 2022)* in the transportation industry and/or for the transportation of dangerous goods. 		

	*A resume for the Project Manager must be included as part of Bidder's Proposal.		
MT-4	<p>The Bidder must demonstrate using project descriptions that the proposed resource as the GIS Specialist has at a minimum:</p> <ul style="list-style-type: none"> • A degree, diploma or certificate*, from a recognized university or college in geography or Geographic Information Systems; • Two (2) years' experience, (within the period from March 31, 2013 to April 1, 2022), working in the field of geography or GIS; and, • Two (2) years' experience, (within the period from March 31, 2013 to April 1, 2022), working with ESRI ArcGIS suite of products. <p>*A copy of the degree, diploma or certificate must be included in the bidder's proposal.</p>		
MT-5	<p>The Bidder must demonstrate using project descriptions that the proposed resource as the Oil Industry Specialist. has at minimum:</p> <ul style="list-style-type: none"> • A degree* from a recognized university in a related field (i.e. Chemistry, Chemical Engineering). • Two (2) years' experience, (within the period from March 31, 2013 to April 1, 2022) working with the handling, offering for transport, transport and import of crude oil and petroleum products <p>*A copy of the degree must be included in the bidder's proposal.</p>		

4.1.1.2 Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified below.

Point Rated Technical Criteria		Maximum points available	Cross Reference in Proposal
RT1	<p>The Bidder's proposal demonstrates an understanding of the following aspects:</p> <ol style="list-style-type: none"> 1.1 The crude oil and petroleum product supply chains in Canada; 1.2 Identification and analysis of the quantities of crude oil and petroleum products in Canada; 1.3 Identification of sites that handle, offer for transport, transport and import crude oil and petroleum products in Canada; and, 	20	

	<p>1.4 Descriptions of the transportation routes of crude oil and petroleum products in Canada.</p> <p><i>Each sub-criterion is assessed and worth 5 points. For each sub-criterion that is addressed, full marks for that sub-criterion will be awarded. For each sub-criterion not addressed, 0 points will be awarded.</i></p>		
RT2	<p>The Bidder's Work Plan submitted in MT1 addresses Quality Control as well as processes to ensure that the work can be delivered successfully, including:</p> <p>2.1 A plan describing quality assurance processes; 2.2 A description of quality assurance processes; and, 2.3 A timetable of milestones;</p> <p><i>Each sub-criterion is assessed and worth 5 points. For each sub-criterion that is addressed, full marks for that sub-criterion will be awarded. For each sub-criterion not addressed, 0 points will be awarded.</i></p>	15	
RT3	<p>The Bidder should demonstrate using project descriptions that the proposed Project Manager has experience in the following elements:</p> <p>3.1 Analyzing transportation data. 3.2 Properties of crude oil and petroleum products; 3.3 Handling, offering for transport, transport and import of crude oil and petroleum products; and, 3.4 Roles and responsibilities of the various parties involved in the supply chains of crude oil and petroleum products.</p> <p><i>Each sub-criterion is assessed and worth 5 points. For each sub-criterion that is addressed, full marks for that sub-criterion will be awarded. For each sub-criterion not addressed, 0 points will be awarded.</i></p>	20	
RT4	<p>The Bidder should demonstrate using Project Descriptions that the proposed GIS Specialist has experience in the following GIS skills:</p> <p>4.1 Transportation route analysis; 4.2 Spatial / statistical analysis; and, 4.3 Programing or scripting in a GIS environment.</p> <p><i>Each sub-criterion is assessed and worth 5 points. For each sub-criterion that is addressed, full marks for that sub-criterion will be awarded. For each sub-criterion not addressed, 0 points will be awarded.</i></p>	15	

RT5	<p>The Bidder should demonstrate using Project Descriptions that the proposed Oil Industry Specialist has experience in the following elements related to:</p> <ul style="list-style-type: none"> 5.1 Properties of crude oil and petroleum products; 5.2 Handling, offering for transport, transport and import of crude oil and petroleum products; and, 5.3 Risks associated with handling of crude oil and petroleum products. <p><i>Each sub-criterion is assessed and worth 5 points. For each sub-criterion that is addressed, full marks for that sub-criterion will be awarded. For each sub-criterion not addressed, 0 points will be awarded.</i></p>	15	
Total (maximum points)		85	

4.1.2 Financial Evaluation

4.1.2.1 Mandatory Financial Criteria

SACC Manual Clause [A0220T](#) (2014-06-26), Evaluation of Price-Bid.

4.2 Basis of Selection

4.2.1 Basis of Selection – Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria;

The rating is performed on a scale of 85 points.
2. Bids not meeting (a) or (b) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70 % for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)				
		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 70 = 59.62$	$89/135 \times 70 = 46.14$	$92/135 \times 70 = 47.70$
	Pricing Score	$45/55 \times 30 = 24.54$	$45/50 \times 30 = 27.00$	$45/45 \times 30 = 30.00$
Combined Rating		84.16	73.14	77.70
Overall Rating		1st	3rd	2nd

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.1.2 Additional Certifications Required with the Bid

5.1.2.1 COVID-19 vaccination requirement certification

This requirement is subject to the COVID-19 Vaccination Policy for Supplier Personnel. Failure to complete and provide the COVID-19 Vaccination Requirement Certification as part of the bid will render the bid non-responsive.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid list at the time of contract award.

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

5.2.3.2 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

Before award of a contract, the following conditions must be met:

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: PWGSC FILE No. T8080-210721

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CSP, **PWGSC**.
3. The Contractor/Offeror **MUST NOT** remove any PROTECTED information or assets from the identified site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of the CSP, **PWGSC**.
5. The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - b) *Contract Security Manual* (Latest Edition).

6.2 Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

PART 7 - RESULTING CONTRACT CLAUSES

7.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

7.2 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

7.2.1 General Conditions

[2035](#) (2021-12-02), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

[4006](#) (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information apply to and form part of the Contract.

7.3 Security Requirements

7.3.1 The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract.

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CSP, **PWGSC**.
3. The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the CSP, **PWGSC**.
5. The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - b) *Contract Security Manual* (Latest Edition).

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2023 inclusive.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Natasha Blackstein
Title: Procurement Specialist
Transport Canada
330 Sparks Street
Ottawa, Ontario
K1A 0N5
Telephone: 343-550-2321
E-mail address: natasha.blackstein@tc.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

7.5.2 Project Authority

The Project Authority for the Contract is: *[to be provided upon contract award]*

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

7.5.3 Contractor's Representative

Name: _____
Title: _____
Telephone: ____-____-_____
E-mail address: _____

7.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2019-01](#) of the Treasury Board Secretariat of Canada.

7.7 Payment

7.7.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price as specified in Annex B for a cost of \$. Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

7.7.2 Method of Payment (Milestone)

For the Work described in the Statement of Work in Annex A, Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and Appendix B-Basis of Payment.

7.7.3 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

7.8 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section titled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. description of the Work delivered
2. Invoices must be distributed as follows:
 - a. The original must be forwarded to the address shown on page 1 of the Contract for certification and payment;

7.9 Certifications and Additional Information

7.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

7.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

7.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the supplemental general conditions [4006](#) (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) the general conditions [2035](#) (2021-12-02), General Conditions - Higher Complexity - Services;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (h) Annex D, COVID-19 vaccination requirement certification
- (i) the Contractor's bid dated _____.

7.12 Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

7.13 Dispute Resolution

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".

ANNEX "A"

STATEMENT OF WORK

1.0 TITLE

Supply Chain Analysis of Crude Oil and Petroleum Products in Canada.

2.0 BACKGROUND

The Transportation of Dangerous Goods Directorate (TDG), based on risks, develops safety regulations and standards, conducts oversight, and provides expert advice on dangerous goods incidents to promote public safety in the transportation of dangerous goods by all modes of transport in Canada.

Canada is a major supplier of secure, reliable crude oil to international markets, producing 4.6 million barrels per day (mb/d) of crude oil in 2018¹. Canada also holds one of the world's largest oil reserves in the world, surpassed only by Saudi Arabia and Venezuela². Canada has 168 billion barrels of proven oil reserves, of which 164 billion barrels are in the form of oil sands³. In 2018, 96% of Canadian crude oil exports went to the U.S. and 4% went to Europe, Asia and the Caribbean⁴. As a result, Canada was the largest foreign supplier of crude oil to the U.S., accounting for 48% of total U.S. crude oil imports and for 22% of U.S. refinery crude oil intake⁵.

As the world recovers from the COVID-19 pandemic, Canadian crude oil output and exports are predicted to grow. In its most recent forecast, the Canada Energy Regulator predicts that by 2040, oil sands production in Canada will increase by approximately 1.5 million barrels per day. As well, Canadian oil production is set to hit a record 5.87 million barrels per day on average in 2022, its highest level ever². In addition to crude oil being a concern for TDG due to high transported volumes and its involvement in many dangerous goods incidents, these forecasts are highlighting a need to reexamine the crude oil supply chain in Canada.

TDG completed its last supply chain analysis on crude oil and petroleum products in 2016. An update to this study will provide an overview of the current handling, offering for transport, transport and import of these dangerous goods in Canada, their respective modes of transport and routing, as well as identification of facilities involved in these supply chains. This update will also provide an overview of how the crude oil and petroleum products supply chain has changed over the past 6 years.

3.0 OBJECTIVE

The primary objective of this GIS study is to comprehensively describe the supply chain from a safety perspective for crude oil and petroleum products in Canada including comprehensive information on crude oil carried by trucks from oil head to rail head, for the purposes of contributing to informed policy decisions regarding safety regulations. In addition, the study will analyze how the supply chains have changed since the previous study in 2016.

^{1,2,3,4,5} <https://www.nrcan.gc.ca/our-natural-resources/energy-sources-distribution/clean-fossil-fuels/crude-oil-industry-overview/18078>

² <https://financialpost.com/executive/executive-summary/posthaste-canada-set-to-smash-oil-production-record-in-2022-and-thats-a-little-bearish-for-oil>

4.0 SCOPE OF WORK

The scope of this study will include the identification of crude oil and petroleum products transported in Canada by all modes. The study will identify all other dangerous goods (DGs) that support these supply chains, including by-products and waste products. These supply chains will encompass the extraction and upgrading of crude oil and petroleum products, the transport to and subsequent refining at refineries until the products reach the primary distribution center.

The Contractor shall propose a valid methodology to undertake the supply chain analysis of the petroleum products including identification of which petroleum products are to be within scope of the study. The methodology must clearly demonstrate how the selected commodities were chosen, and any strategy that can be used to more efficiently complete the supply chain analysis (for example, commodities to be analyzed can be grouped in subsets of petroleum products in a way that uses similarities among them, either in characteristics or uses).

The Contractor shall identify and describe the extraction, production, processing and refining of crude oil and the selected petroleum products. This includes the locations of oil heads and transloading facilities involved in loading trucks and rail cars. Where possible, the consultant will identify if the rail head receives oil from any other modes (i.e. pipelines, rail), which railway (Class 1 or short line) serves the facility, the capacity of the terminal and whether the terminal has plans to expand the facility. Additionally, the Contractor shall identify and describe of the DG inputs and by-products (including waste) from the extraction, production, processing and refining of crude oil and the selected petroleum products in Canada.

The Contractor shall map the locations of extraction, production, processing and refining facilities, the locations of transportation, distribution and handling sites, and the routes used to transport crude oil and the selected petroleum products including the routes used by trucks carrying crude oil from oil heads to rail heads and transload sites.

5.0 TASK / REQUIREMENTS

The Contractor must fulfill the following tasks to satisfy the requirements of the study:

- 1) Comprehensively describe the supply chain of crude oil and each of the petroleum products in Canada.
- 2) Identify sites that extract, produce, process and refine crude oil and each of the petroleum products.
- 3) Identify the sites that handle, offer for transport, transport and import crude oil and each of the petroleum products.
- 4) Identify the transportation routes, by mode and paired origin-destination, of crude oil and each of the petroleum products.
- 5) Identify the dangerous goods used to support the supply chains of crude oil and each of the petroleum products
- 6) Identify the dangerous goods produced as by-products and waste from the supply chains of crude oil and each of the petroleum products

6.0 DELIVERABLES AND REPORTING

6.1 Kick-off meeting:

A kick-off meeting will be held between the Contractor and the TC project authority. This meeting is intended to review the draft work plan submitted as part of the Contractor's proposal and finalize the requirements for the study, including:

- a) The Contractor's understanding of the scope of work and requirements needed to complete the study.
- b) A draft Table of Contents for the report which will define how the report is organized;
- c) A draft of methodologies to be used for data collection, data analysis and GIS analysis;
- d) The Contractor demonstrates that they can produce all geospatial deliverables using ESRI ArcGIS suite of products including producing all maps in ESRI ArcGIS map documents (mxd) or ESRI ArcGIS Project Files (aprx).
- e) Description of data and metadata formatting, naming conventions, and any other means to which the Contractor will organize the data;
- f) The schedule of work and timeline for project deliverables (GANTT chart or similar) showing activities and milestones; and,
- g) A draft reference list, including preliminary sources for data, internal data sources TDG must provide, as well as external datasets that TDG may assist in acquiring.

If internal TC data is required, the Contractor must provide, at the kick-off meeting, details of the data, including name of datasets, fields of interest and time period.

If TC is required to acquire external data on behalf of the Contractor, the Contractor must provide, at the kick-off meeting, names and contact information, dataset names, fields of interest and time periods for data extract.

Meeting will be held: Within one (1) week after date of Contract award.

6.2 Final work plan:

The final work plan will be based on the draft submitted with the Contractor's proposal. Edits and changes will be incorporated from discussions held during the kick-off meeting and other consultations with the client. The final work plan must specify:

- a) The specific activities anticipated;
- b) Timelines, milestones and deliverables;
- c) The level of effort and resource for each activity; and
- d) A project plan using a Gantt chart or equivalent format.

Once accepted, the contracted work shall begin. All tasks shall be completed within the timeframe specified. The Contractor shall seek approval from the TC Project Authority with regard to all updates or revisions to the project plan or schedule throughout the life cycle of the project.

Completion Date: Final work plan to be submitted within one (1) week after the kick-off meeting.

6.3 Bi-weekly meeting:

The Contractor must provide bi-weekly (every two weeks) written updates, in English, which will include a status update and/or progress report for the duration of that period. This frequency may be changed if deemed necessary and approved by TC.

Completion Date: 11:00 a.m. EST on the second Monday of each two-week period following the date of Contract award or any other completion date to be agreed to between the Contractor and TC Project Authority.

6.4 Mid-Project Report & sample of GIS work:

The Contractor must provide TC with a mid-project report. The mid-project report must include:

- a) A detailed description of the work completed, status of work underway and description of work remaining;
- b) An explanation of the results to date;
- c) Contacts and references as applicable for sources of data;
- d) Data samples, and GIS products produced using the ESRI ArcGIS suite of products. All sample maps must be delivered with an accompanying ESRI ArcGIS map documents (.mxd), or ESRI ArcGIS Project File (.aprx) file; and,
- e) Data limitations

The Contractor must implement TC's questions and comments in subsequent work.

Completion Date: Mid-Project report and samples of GIS work must be completed by 11:00 a.m. EST on the Friday of the twelfth (12th) week following the kick-off meeting, or any other completion date to be agreed to between the Contractor and TC Project Authority.

6.5 Draft Report

The Contractor must provide TC with a draft final report in English. The reports will document the research, analysis and final conclusions of the study, and must include:

- a) Title page;
- b) Executive summary of report;

- Summary by UN number of crude oil and petroleum products and the modes of transport, volumes, geospatial patterns, market, trade and safety issues associated with each, as well as data limitations
- c) Table of contents;
- d) Glossary, List of Tables and List of Figures;
- e) Introduction;
- Overview of the study
 - Background and the objective of the study
- f) Detailed Results and Analysis;
- Comprehensively describe the supply chain of crude oil and each of the petroleum products in Canada;
 - Identify sites that extract, produce, process and refine crude oil and each of the petroleum products;
 - Identify the sites that handle, offer for transport, transport and import crude oil and each of the petroleum products;
 - Identify the transportation routes, by mode and paired origin-destination, of crude oil and each of the petroleum products;
 - Identify the dangerous goods used to support the supply chains of crude oil and each of the petroleum products; and,
 - Identify the dangerous goods produced as by-products and waste from the supply chains of crude oil and each of the petroleum products.
- g) Conclusions, Next Steps, and Data Limitations:
- Overall conclusions and recommendations on next steps;
 - Limitations of study, data gaps and areas for further research;
 - Identification of possible resources and/or options for narrowing knowledge gaps.
- h) Technical memorandum;
- Description of all geospatial work and modelling, including a discussion where applicable about the models chosen and why
 - Glossary of terms and data dictionary
- i) References; and
- Sources of data
 - List of companies and stakeholders that are identified in the course of the study, with address and geographic coordinates
- j) Data Annexes, including but not limited to GIS maps and data tables for transportation modes, routes, and volumes for each DG or DG groupings (all including complete metadata), as well as any additional data tables graphics or information relevant to the study.

The Draft Report will be created using a word-processing program agreed to by TC and the Contractor at the start of the project, such as Microsoft Word (Office 2007 or more recent versions) and Adobe Acrobat (most recent version).

Completion Date: 9:00 am EST fifteen (15) days prior to the contract end date or any other completion date to be agreed to between the Contractor and TC Project Authority.

6.6 Electronic Data - Draft tabular data and GIS data

- a) The Contractor must provide TC with a draft of the final tabular data. The draft spreadsheets must be created using Microsoft Excel (2013 or more recent versions). The data deliverable must include the following for dangerous goods transported within Canada and within the study period:
- i. Each dangerous good identified within the scope of the study with attributes including (but not limited to):
 - Unique identifier for each record
 - Names, class, and UN number of the dangerous good;
 - Volumetric data of each dangerous good;
 - Mode of transport used for distribution;
 - Type of route used for transportation including seasonal nature;
 - Latitude and Longitude coordinates of paired origin/destination locations; and
 - Province names of paired origin/destination locations.
 - b) The Contractor must also provide TC with draft GIS data and draft map products accompanied by complete data dictionaries, application and usage documentation, and metadata. Mapping must be produced using ESRI ArcGIS suite of products. The record layout of geospatial data must meet the requirements as agreed to in the kick-off meeting. GIS data deliverables must include:
 - i. A Point location feature class or shapefile of the sites which handle, offer for transport, transport and import crude oil and petroleum products with attributes including (but not limited to):
 - Unique identifier for each record;
 - Address information of the site (street number, street name, province, postal code, and country in separate columns);
 - Name of site of facility;
 - Type of facility (i.e. Distribution/Transportation and Handling Sites);
 - Coordinates (Latitude and longitude in separate columns);
 - Name, class and UN numbers of dangerous goods produced at the site within study period;
 - Names, class and UN numbers of dangerous goods by-products and dangerous goods waste produced at the site
 - Volumetric data of dangerous goods handled within the study period. (estimates of volumes are acceptable when actual volumetric data is unavailable)
 - ii. Line feature classes or shapefiles of transportation infrastructure within Canada with attributes including (but not limited to):
 - Unique identifier for each record;
 - Name / owner;
 - Province origin, province destination;
 - Mode / type of transportation infrastructure (road, ice road, ferry line, marine shipping route, railway, etc.); and
 - Total length.
 - iii. Line feature classes or shapefiles showing the commodity flow by each mode for each dangerous good of interest with attributes including (but not limited to):
 - Aggregated volume of the dangerous good that traverses over each segment of the network
 - Unique identifier;

- UN number, Primary Class, and subsidiary class(es) if applicable;
 - Volume and weight data of each DG;
 - Paired origin/destination locations;
 - Data dictionary or use documentation; and
 - Complete metadata.
- iv. A map product (i.e. ArcGIS map document 'mxd' or ESRI ArcGIS project file (.aprx) file) of all the commodity flows for each dangerous good of interest, symbolized to show the aggregated volumes of dangerous goods that traverses over each segment of the network, including the following map elements:
- Title clearly conveying the data being mapped
 - Scale bar
 - Legend that is legible and clearly reflects the presented data
 - Date (month and year) when map was produced
 - Source(s) of the data being mapped

Mapping **must** be conducted on, and produced with ESRI ArcGIS suite of products (i.e. all maps must have an accompanying ESRI ArcGIS map document (.mxd) or ESRI ArcGIS Project File (.aprx)). The record layout of geospatial data must meet the requirements as discussed during the kick-off meeting.

The Draft Report and GIS Data will be reviewed by TC, with all questions and comments recorded on a disposition of comments document provided by the Contractor. The Contractor shall answer and implement TC's questions and comments when preparing the final report.

Complete Date: 9:00 a.m. EST fifteen (15) days prior to the contract end date or any other completion date to be agreed to between the Contractor and TC Project Authority.

7.0 FINAL REPORT AND FINAL TABULAR AND GIS DATA

The Contractor must provide TC with four (4) copies of the final project report:

- One (1) copy in English for internal dissemination;
- One (1) copy in French for internal dissemination;
- One (1) copy in English for public dissemination, and
- One (1) copy in French for public dissemination.

The final report for internal dissemination will consist of the same deliverables outlined in Section 6.5 as in the Draft Report but with the implementation of all comments and feedback provided by TC during draft consultations.

The final report for public dissemination will be the same as the final report for internal use, but with the removal, reformatting and aggregation of data so that commercial sensitivity is protected.

The Contractor must also provide TC with the final tabular data and GIS data, in an electronic format as specified in Section 6.6.

All map products including base maps must be provided in both English and French in separate PDF packages (i.e. all maps in English in one PDF package and all maps in French in another PDF package).

Completion Date: On or before 12:00 pm EST on the contract end date.

8.0 PRESENTATION

The contractor shall provide and deliver a presentation in English to TC. The presentation will be presented via webinar based on the Final Report. The Contractor must provide TC with two (2) versions of the presentation:

- One (1) for internal dissemination, and
- One (1) for public dissemination.

The final presentation for public dissemination will be the same as the final presentation for internal use, but with the removal, reformatting and aggregation of data so that commercial sensitivity is protected. The presentation will be given in Microsoft PowerPoint format. In addition, the contractor shall include a recording made during the presentation, as well as permission to use the material in whole or in part.

Completion Date: On or before 12:00 pm EST on the contract end date.

9.0 LANGUAGE REQUIREMENTS

The principal language of communication with Transport Canada will be English. Draft reports will be in English. Final presentations and final results (i.e. project reports) must be both English and French as described in Section 7.0.

10.0 DATA / REFERENCES / MATERIAL

Data

The Contractor will be responsible for purchasing data outside of what resources Transport Canada (TC) currently has. Before receiving data from TC, the Contractor must conclude a non-disclosure agreement with TC on the handling, use and final disposition of the data. No sensitive information will be accessed by the Contractor and; therefore, no security clearance is required.

The Contractor is responsible for assembling all scientific, economic, transportation and any other data necessary to complete the study. TC will make available, subject to agreed limitations, the transportation statistics and geospatial data that it holds, providing the data in formats and aggregations that will be agreed upon at the kick-off meeting.

Documentation

The Contractor will document and provide metadata for all sources of data and information used during this contract.

11.0 WORK LOCATION

The work will be completed at the Contractor's site; however, the Contractor's primary contact will be required to participate in bi-weekly teleconference meetings with the TC Project Authority and a webinar presentation.

12.0 RESPONSIBILITIES OF THE PROJECT AUTHORITY

The TC Project Authority is responsible for the following:

- 12.1 Monitor contract progress and provide feedback to the contractor as required within two weeks; and
- 12.2 Make available all required data using formats and aggregations that will be agreed upon in the kick-off meeting after the nondisclosure agreements have been signed.

13.0 RESPONSIBILITIES OF THE CONTRACTOR

The Contractor will maintain responsibility for the following:

Ensure the availability of adequate resources to complete the contract on schedule, and the availability of back-up resources in case of unforeseen illness, injury or other reasons that may result in the withdrawal of the planned resources, as per section 17; and

Ensure that the interests of all stakeholders (e.g. industry, TC, Statistics Canada, etc.) are fully protected in accordance with the non-disclosure agreement.

ANNEX "B"

BASIS OF PAYMENT

In consideration of the Contractor satisfactorily completing all of its obligations under the terms and conditions of this Contract, the Contractor will be paid an all- inclusive firm price.

All prices and costs must be submitted in Canadian Dollars, Canadian customs duties and excise taxes included. Applicable taxes excluded.

Milestone No.	Description or "Deliverable"	Firm Amount	Delivery Date
1	Delivery of final workplan	\$ _____ (10% of price)	1 week following contract signature and kick-off meeting
2	Delivery of mid-project report	\$ _____ (20% of price)	12 th week following kick-off meeting
3	Delivery of draft final report	\$ _____ (60% of price)	15 days prior to contract end date
4	Acceptance of the final report and PowerPoint that incorporate the feedback from TC (Section 7.D. of Annex A)	\$ _____ (10% of price)	Delivery of final report and presentation
Total Cost for Evaluation Purposes (Sum of Milestone 1 to Milestone 4 (with no Taxes))		\$ _____	
Applicable Taxes (insert the amount, as applicable)		\$ _____	
Total Cost (taxes included)		\$ _____	

ANNEX "C"

SECURITY REQUIREMENTS CHECK LIST



Contract Number / Numéro du contrat T8080-210721
Security Classification / Classification de sécurité

SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE			
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Transport Canada		2. Branch or Directorate / Direction générale ou Direction TransDG	
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Supply Chain Analysis of Crude Oil and Petroleum Products in Canada-The scope of this study will include the identification of crude oil and petroleum products transported in Canada by all modes. The study will identify all other dangerous goods (DGs) that support these supply chains, including by-products and waste products. These supply chains will encompass the extraction and upgrading of crude oil and petroleum products, the transport to and subsequent refining at refineries until the products reach the primary distribution center.			
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada	<input checked="" type="checkbox"/>	NATO / OTAN	<input type="checkbox"/>
		Foreign / Étranger	<input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions Aucune restriction relative à la diffusion	<input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN	<input type="checkbox"/>
Not releasable À ne pas diffuser	<input type="checkbox"/>		
Restricted to: / Limité à:	<input type="checkbox"/>	Restricted to: / Limité à:	<input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:		Specify country(ies): / Préciser le(s) pays:	
7. c) Level of information / Niveau d'information			
PROTECTED A PROTÉGÉ A	<input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ	<input type="checkbox"/>
PROTECTED B PROTÉGÉ B	<input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE	<input type="checkbox"/>
PROTECTED C PROTÉGÉ C	<input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/>	NATO SECRET NATO SECRET	<input type="checkbox"/>
SECRET	<input type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET	<input type="checkbox"/>
TOP SECRET TRÈS SECRET	<input type="checkbox"/>		
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT)	<input type="checkbox"/>		
		PROTECTED A PROTÉGÉ A	<input type="checkbox"/>
		PROTECTED B PROTÉGÉ B	<input type="checkbox"/>
		PROTECTED C PROTÉGÉ C	<input type="checkbox"/>
		CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/>
		SECRET	<input type="checkbox"/>
		TOP SECRET TRÈS SECRET	<input type="checkbox"/>
		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT)	<input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité





Contract Number / Numéro du contrat T8080-210721
Security Classification / Classification de sécurité

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui

If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No Yes
Non Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITE	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMBLEMES			

Special comments:
Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No Yes
Non Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No Yes
Non Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No Yes
Non Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No Yes
Non Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No Yes
Non Oui

Contract Number / Numéro du contrat
T8080-210721
Security Classification / Classification de sécurité

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ		NATO				COMSEC							
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET	
				CONFIDENTIAL		TRÈS SECRET	NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL			A	B	C	CONFIDENTIEL		TRÈS SECRET	
Information / Assets																	
Renseignements / Biens																	
Production																	
IT Media / Support TI																	
IT Link / Lien électronique																	

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat T8080-210721
Security Classification / Classification de sécurité

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) Monica Blaney	Title - Titre Chief, Risk Evaluation	Signature 	
Telephone No. - N° de téléphone (813) 219-9259	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel monica.blaney.tc.gc.ca	Date April 6, 2022
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées) Remi Gagnon	Title - Titre A/IT Director, IT Security	Signature Gagnon, Remi	Digitally signed by Gagnon, Remi Date: 2022.04.08 14:52:06 -04'00'
Telephone No. - N° de téléphone (613) 854-8622	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel Remi.Gagnon@tc.gc.ca	Date 2022-04-07
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature Blackstein, Natasha	Digitally signed by Blackstein, Natasha Date: 2022.04.19 11:12:49 -04'00'
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées) Patrick Gaudreau-Ritlop Contract Security Officer Patrick.Gaudreau-Ritlop@tpsgc-pwgsc.gc.ca	Title - Titre	Signature GaudreauRitlop, Patrick	Digitally signed by GaudreauRitlop, Patrick Date: 2022.04.14 14:35:09 -04'00'
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date



CONTRACT SECURITY PROGRAM (CSP)

APPLICATION FOR REGISTRATION (AFR) for Canadian legal entities

Instructions for completing the Application for Registration (AFR)

Privacy notice for Canadian entities registering in the CSP

Part of the information collected in this form includes personal information which is collected under the authority of subsection 7(1) of the *Financial Administration Act* and is mandatory in accordance with Treasury Board's *Policy on Government Security and Standard on Security Screening* for the purposes of security assessment and registration in the Contract Security Program (CSP) of Public Services and Procurement Canada (PSPC). The personal information will be used to assess your eligibility to hold a security status or security clearance and for your organization to be registered in the Contract Security Program. The information provided may be disclosed to the Royal Canadian Mounted Police and Canadian Security Intelligence Service to conduct the requisite checks and / or investigation in accordance with the *Policy on Government Security and Standard on Security Screening*. Additionally, the information may be disclosed to and used by other federal institutions that may require this information as part of their functions or investigation under Canadian Law or to the industrial security programs of foreign governments (with which Canada has bilateral security instruments) for foreign assurances.

Personal information is protected, used and disclosed in accordance with the Privacy Act and is described in the Info Source under the Personal Information Bank PWGSC PPU 015 ([Access to information and privacy - PSPC \(tpsgc-pwgsc.gc.ca\)](https://www.tpsgc-pwgsc.gc.ca/access-to-information-and-privacy-pspc)) and the TBS standard personal information bank Personal Security Screening PSU 917 ([Standard personal information banks - Canada.ca](https://www.tpsgc-pwgsc.gc.ca/standard-personal-information-banks-canada)). Under the Privacy Act, you have the right to access and correct your personal information, if erroneous or incomplete. The personal information from paper sources that accompanies an organization registration is retained for two years after the last administrative action, and then destroyed. The personal information from paper sources that accompanies a foreign ownership, control, or influence assessments is kept for two years, and then destroyed if there are no changes to the organization that are reported to the foreign ownership, control, or influence evaluation office during this period. The personal information from paper sources that accompanies the personnel security screening process or foreign assurance process will be retained for a minimum period of two years after the last administrative action, and then destroyed. The Contract Security Program's retention period and disposal standards of personal information in electronic format may vary from the above retention period.

If you have concerns or require clarification about this privacy notice, you can contact PSPC's Access to Information and Privacy Directorate by email at TPSGC.ViePrivee-Privacy.PWGSC@tpsgc-pwgsc.gc.ca. If you are not satisfied with the response to your privacy concern or if you want to file a complaint about the handling of your personal information, you may wish to contact the Office of the Privacy Commissioner of Canada.

General Instructions:

- This form is used for registering Canadian legal entities **ONLY**. The CSP does not register foreign based organizations. **ALL** Foreign based firms must contact the [International Industrial Security Directorate \(IISD\)](#) for more information on the security screening process. Canadian subsidiaries of foreign based firms may be eligible to register with the CSP.
- This form and all supporting documentation requested must be provided in English or French
- In any instance where this form does not allow enough space for a complete answer, please include additional pages or rows to the table as required.

For organizations that do not yet have a clearance, refusal to provide required information, the provision of a false statement, misleading information, concealment or failure to disclose of any material fact on this application will result in the CSP not granting, or upgrading, a security clearance.

In the case of already cleared organizations; a denial or revocation of your organization's existing security clearance may occur and any personnel reliability statuses and/or personnel security clearances issued to your organization will be administratively closed out along with the organization's clearance with the Contract Security Program. This will immediately prohibit your eligibility to perform work on contracts requiring organization security clearances.



CONTRACT SECURITY PROGRAM (CSP)

Section A - Business Information

- **Legal name of the organization** refers to the legal name of the organization as it is organized & existing within the country of jurisdiction. In the case of Canadian legal entities, this would be the legal name that is registered with federal, provincial or territorial authorities.
- **Business or Trade name** refers to the name which a business trades under for commercial purposes, although its registered, legal name, used for contracts and other formal situations, may be another name.
- **Type of Organization** - All required documentation in relation to the type of organization must be provided
 - **Corporation** refers to an entity having authority under the law to act as a single person distinct from the shareholders who own it and having rights to issue stock and exist indefinitely.
Provide the following information to substantiate this "Type of Organization" selection:
 - Stock exchange identifier (if applicable);
 - Certificate of incorporation, compliance, continuance, current articles of incorporation, etc.
 - Ownership structure chart is mandatory
 - **Partnership** refers to an association or relationship between two or more individuals, corporations, trusts, or partnerships that join together to carry on a trade or business.
Provide the following information to substantiate this "Type of Organization" selection:
 - Evidence of legal status, ie. partnership agreement;
 - Provincial partnership name registration (if applicable);
 - Ownership structure chart
 - **Sole proprietor** refers to the owner of a business who acts alone and has no partners.
Provide the provincial registration documentation (if applicable) ie. master business license, provincial name registration document
 - **Other** (universities, financial institutions, unincorporated organizations, Assembly of First Nations, etc.)
Provide the following information to substantiate this "Type of Organization" selection:
 - Evidence of legal status such as acts, charters, bands, etc.
 - Ownership structure chart and management structure chart
- **Principal place of business** must be where the business is physically located and operating in Canada. Virtual locations, mail boxes, receiving offices, coworking spaces, representative agent's office, etc. will not be accepted.
- **Self-identify as a diverse supplier:** Public Services and Procurement Canada (PSPC) defines a diverse supplier as "a business owned or led by Canadians from underrepresented groups, such as women, Indigenous Peoples, persons with disabilities and visible minorities.

Section B - Security Officers

Identify the individual(s) you intend to nominate or are already appointed as your organization's company security officer and alternate company security officer(s). For Document Safeguarding Capability at other locations, please ensure to indicate address (site) the ACSO is located at. Add additional rows or provide a separate page as required. Employee has the same meaning as that used by the Canada Revenue Agency.

- Email address must be able to accept various types of correspondence from the CSP
- Security officers **must** meet all of the following criteria:
 - an employee of the organization;
 - physically located in Canada;
 - a Canadian citizen*; and
 - security screened at the same level as the organization (in some cases alternates may require a different level).

*Canadian citizenship is required due to the oversight responsibility entrusted to a security officer and some contractual requirements in relation to national security. This requirement may be waived on a case by case basis for Permanent Residents.

CONTRACT SECURITY PROGRAM (CSP)

Section C - Officers

- Your organization must list **all** the names and position titles for its officers, management, leadership team, executives, managing partners, authorized signatories, members, etc. that are responsible for the day to day operations of its business. A management structure chart must be provided to demonstrate the reporting structure. Add additional rows to the section if required.
- For the purposes of the Contract Security Program, the term "Country of Primary Residence/National Domicile" refers to the particular country for a person's true, fixed, principal and permanent home, to which that person intends to return and remain even though currently residing elsewhere.
- **Citizenship** refers to the status of being a citizen. A **citizen** is a person who, by either birth or naturalization, is a member of a state or nation, entitled to enjoy all the civil rights and protections of that state or nation and owing allegiance to its government.

Section D - Board of Directors

- List **all** members of your organization's board of directors. Indicate all board titles including the chairperson if there is one. Add additional rows to the section or on a separate page if required.
- For the purposes of the Contract Security Program, the term "Country of Primary Residence/National Domicile" refers to the particular country for a person's true, fixed, principal and permanent home, to which that person intends to return and remain even though currently residing elsewhere.
- **Citizenship** refers to the status of being a citizen. A **citizen** is a person who, by either birth or naturalization, is a member of a state or nation, entitled to enjoy all the civil rights and protections of that state or nation and owing allegiance to its government.

Section E - Ownership Information

- For the purposes of the CSP, the following interpretations are applicable:
 - **Direct (or registered) ownership** are **all** owners who hold legal title to a property or asset in that owner's name.
 - **Ownership** refers to either (1) voting rights attached to the corporation's outstanding voting shares or (2) outstanding shares measured by fair market value.
 - **Parent company** refers to a company which owns and/or controls controlling interest (e.g., voting stock) of other firms or companies, usually known as subsidiaries, which may give it control of the operation of the subsidiaries.

Section F - Justification (this section is to be completed by organizations that are undergoing a renewal ONLY - not bidding)

- Your organization is to provide a list of active federal contracts, subcontracts, leases, supply arrangements (SA), standing offers (SO), purchase orders that have security requirements. Indicate the contract number (lease, SA, SO, sub-contract, etc.), contracting authority or prime contractor and the security level requirement.

Section G - Certification and Consent

- Only an officer identified in Section C may complete this section.



Organization #

Protected (once completed)

CONTRACT SECURITY PROGRAM (CSP)

APPLICATION FOR REGISTRATION (AFR) for Canadian legal entities

NOTE:

The provision of false, misleading information, or concealment and/or failure to disclose of any material fact on this application will result in a denial or revocation of your organization security clearance and registration with the Contract Security Program which will immediately prohibit your eligibility to perform on contracts requiring organization security clearances. An incomplete form **will not** be processed.

SECTION A - BUSINESS INFORMATION	
1. Legal name of the organization <input type="text"/>	
2. Business or trade name (if different from legal name) <input type="text"/>	
3. Type of organization - Indicate the type of organization and provide the required validation documentation (select one only)	
<input type="checkbox"/> Sole proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <ul style="list-style-type: none"> <input type="checkbox"/> Private <input type="checkbox"/> Public <input type="checkbox"/> Other (specify) <input type="text"/>	
4. Provide a brief description of your organization's general business activities. <input type="text"/>	
5. Procurement Business Number (PBN) (if applicable) <input type="text"/>	6. Self-identify as a diverse supplier (provide profile) <input type="text"/>
7. Business civic address (head office) <input type="text"/>	
8. Principal place of business (if not at head office) <input type="text"/>	
9. Mailing address (if different from business civic address) <input type="text"/>	
10. Organization website (if applicable) <input type="text"/>	
11. Telephone number <input type="text"/>	12. Facsimile number <input type="text"/>
13. Number of employees in your organization or corporate entity <input type="text"/>	14. Number of employees requiring access to protected/classified information/assets/sites <input type="text"/>

CONTRACT SECURITY PROGRAM (CSP)

SECTION B – SECURITY OFFICERS
 Please identify all security officers for your organization. For document safeguarding capability identify the site number for each ACSO and the corresponding address for each site below.
 Add additional rows or attachments as needed if there is not enough space allotted

Position title	Site #	Surname	Given name	E-mail (where the CSP will send correspondence)
Company security officer (CSO)				
Alternate company security officer (ACSO)				
ACSO (if applicable)				
ACSO (if applicable)				
ACSO (if applicable)				

For Document Safeguarding Capability ONLY:

00 – Address will be principal place of business	
01 – Site address:	<input style="width: 570px; height: 15px;" type="text"/>
02 – Site address:	<input style="width: 570px; height: 15px;" type="text"/>

SECTION C – OFFICERS (managing partners, key leadership, signatories, etc.)
 Add additional rows or attachments as needed and include management structure chart demonstrating reporting structures

Position title - within your organization	Surname	Given name	Citizenship(s)	Country of primary residence/National domicile

CONTRACT SECURITY PROGRAM (CSP)

SECTION D - LIST OF BOARD OF DIRECTORS				
Add additional rows or attachments as needed				
Position title	Surname	Given name	Citizenship(s)	Country of primary residence/National domicile

SECTION E - OWNERSHIP INFORMATION - PLEASE COMPLETE FOR EACH LEVEL OF OWNERSHIP

Please complete for each level of ownership

Identify all entities, individuals, public or private corporations that have an ownership stake in your organization being registered. Indicate if the entity has a valid Facility Security Clearance from Public Services and Procurement Canada's Contract Security Program or any other country. For publicly traded corporations, identify stock exchange. If there are more than three levels of ownership; please submit on an additional page to include all levels of ownership from direct to ultimate.

Note: The organization structure chart with percentages of ownership must be included with your submission

SECTION E-1 - OWNERSHIP LEVEL 1 (direct ownership) if more than three - please provide on additional sheet

Ownership - Level 1 (Direct Parent)			
Name of organization or individual			
Address			
Type of entity (e.g. private or public corporation, state-owned)			
Stock exchange identifier (if applicable)			
Facility security clearance (FSC) yes/no			
Percentage of ownership			
Country of jurisdiction or citizenship			



CONTRACT SECURITY PROGRAM (CSP)

SECTION E-2 - OWNERSHIP LEVEL 2

If there is any additional ownership for the names listed in the previous section (E-1) please provide the information below. If not, please indicate N/A (not applicable).

Ownership of entries listed in E-1 (Level 2)

Name of direct owner from E-1			
Name of organization or individual			
Address			
Type of entity (e.g. private or public corporation, state-owned)			
Stock exchange identifier (if applicable)			
Facility security clearance (FSC) yes/no			
Percentage of ownership			
Country of jurisdiction or citizenship			

SECTION E-3 - OWNERSHIP LEVEL 3

If there is any additional ownership for the names listed in the previous section (E-2) please provide the information below. If not, please indicate N/A (not applicable).

Ownership of entries listed in E-2 (Level 3)

Name of intermediary ownership from E-2			
Name of organization or individual			
Address			
Type of entity (e.g. private or public corporation, state-owned)			
Stock exchange identifier (if applicable)			
Facility security clearance (FSC) yes/no			
Percentage of ownership			
Country of jurisdiction or citizenship			



CONTRACT SECURITY PROGRAM (CSP)

SECTION F - JUSTIFICATION (FOR RENEWING ORGANIZATIONS)

Add additional rows or attachments as needed

Please provide all current procurement rationales that have security requirements - i.e. contracts, leases, RFP, RFI, ITQ, supply arrangements, standing offers, etc.

Contract, lease, SA, SO, etc. number	Client / contracting authority	Security Type & level	Expiry date (dd-mm-yyyy)

SECTION G - CERTIFICATION AND CONSENT (ONLY AN OFFICER IDENTIFIED IN SECTION C MAY COMPLETE THIS SECTION)

I, the undersigned, as the Officer authorized by the organization, have read the Privacy Notice to this application and do hereby certify that the information contained in this application is true, complete and correct. I acknowledge and agree to comply with the responsibilities outlined in the Public Services and Procurement Canada's Contract Security Manual and consent to the collection, use and disclosure of my personal information for the purposes as described above. I agree to notify the Contract Security Program of any changes to the organization including but not limited to: change of address, phone number, contact information, change in security officers, officers and directors, board members, partners, management / leadership team and ownership.

Surname <input type="text"/>	Given name <input type="text"/>
Position title <input type="text"/>	Telephone number (include extension number if any) <input type="text"/>
Facsimile number <input type="text"/>	Email address <input type="text"/>
Signature <input type="text"/>	Date (dd-mm-yyyy) <input type="text"/>

FOR USE BY THE PSPC'S CONTRACT SECURITY PROGRAM

Recommendations <input type="text"/>	
Recommended by e-signature <input type="text"/>	Approved by e-signature <input type="text"/>

ANNEX "D"

In accordance with the COVID-19 Vaccination Policy for Supplier Personnel, all Bidders must provide with their bid, the COVID-19 Vaccination Requirement Certification attached to this bid solicitation, to be given further consideration in this procurement process. This Certification incorporated into the bid solicitation on its closing date is incorporated into, and forms a binding part of any resulting Contract.

COVID-19 Vaccination Requirement Certification

I, _____ (*first and last name*), as the representative of
_____ (*name of business*) pursuant to
_____ (*insert solicitation number*), warrant and certify that all
personnel that _____ (*name of business*) will provide on the
resulting Contract who access federal government workplaces where they may come into contact with
public servants will be:

- a. fully vaccinated against COVID-19;
- b. for personnel that are unable to be vaccinated due to a certified medical contraindication, religion or other prohibited grounds of discrimination under the *Canadian Human Rights Act*, subject to accommodation and mitigation measures that have been presented to and approved by Canada; or
- c. partially vaccinated against COVID-19 for a period of up to 10 weeks from the date of their first dose and subject to temporary measures that have been presented to and approved by Canada, immediately after which period the personnel will meet the conditions of (a) or (b) or will no longer access federal government workplaces where they may come into contact with public servants under this Contract;

until such time that Canada indicates that the vaccination requirements of the COVID-19 Vaccination Policy for Supplier Personnel are no longer in effect.

I certify that all personnel provided by _____ (*name of business*) have been notified of the vaccination requirements of the Government of Canada's COVID-19 Vaccination Policy for Supplier Personnel, and that the
_____ (*name of business*) has certified to their compliance with
this requirement.

I certify that the information provided is true as of the date indicated below and will continue to be true for the duration of the Contract. I understand that the certifications provided to Canada are subject to verification at all times. I also understand that Canada will declare a contractor in default, if a certification is found to be untrue, whether made knowingly or unknowingly, during the bid or contract period. Canada reserves the right to ask for additional information to verify the certifications. Failure to comply with any request or requirement imposed by Canada will constitute a default under the Contract.

Signature: _____

Date: _____

Optional

For data purposes only, initial below if your business already has its own mandatory vaccination policy or requirements for employees in place. Initialing below **is not** a substitute for completing the mandatory certification above.

Initials: _____

Information you provide on this Certification Form and in accordance with the Government of Canada's COVID-19 Vaccination Policy for Supplier Personnel will be protected, used, stored and disclosed in accordance with the *Privacy Act*. Please note that you have a right to access and correct any information on your file, and you have a right to file a complaint with the Office of the Privacy Commissioner regarding the handling of your personal information. These rights also apply to all individuals who are deemed to be personnel for the purpose for the Contract and who require access to federal government workplaces where they may come into contact with public servants.